Discovery call script

40 questions in five groups, an opening and a close. Pick eight to 14 before each call and circle their numbers.

Client and company

Date and time of the call

What they said in the form

Before you call

- Read their form answers. Do not ask anything the form already answered.
- Circle the questions you plan to ask. Start with the problem and leave budget until later.
- Ask one question at a time, then wait. Silence is fine.
- Write down their words, not your reading of them. You will quote them in the proposal.

Opening

“Hi [name], thanks for making the time. I read your form, so I won't make you repeat it. I'd like to spend most of our time on what you need and what a good result looks like. At the end we'll agree a next step, even if that next step is a polite no. Does that sound OK?”

The problem

#	Question	Notes
1	What made you reach out now?	
2	What's happening today that you want to change?	
3	How long has this been a problem?	
4	What have you already tried, and how did it go?	
5	What happens if nothing changes in the next six months?	
6	Who else feels this problem, on your team or among your customers?	
7	What are you using today, and what do you like about it?	
8	If you could fix only one part of this, which part would it be?	

What success looks like

#	Question	Notes
9	Picture six months from now, and this went well. What has changed?	
10	How will you know it worked? What would you measure?	
11	What would make this feel worth every penny?	
12	Have you worked with someone like me before? What worked, and what didn't?	
13	What would make this a letdown, even if it arrived on time?	
14	How involved do you want to be week to week?	
15	Is there anything you definitely don't want?	
16	What does a great partner look like to you?	

Budget

#	Question	Notes
17	Have you set a budget for this, even a rough range?	
18	How did you arrive at that number?	
19	Is the budget for this project only, or for ongoing work too?	
20	Do you prefer a fixed price, a monthly retainer or paying by the hour?	
21	What else is competing for this budget?	
22	If the right option costs more than you planned, what happens then?	
23	How do you usually pay: up front, in stages or at the end?	
24	What would a good return on this look like for you?	

Timeline

#	Question	Notes
25	When would you like to start?	
26	Is there a date this has to be done by? What's behind that date?	
27	What happens if it slips by a month?	
28	Are there busy seasons, launches or holidays we should plan around?	
29	How quickly can you usually give feedback?	
30	What needs to happen on your side before we can start?	
31	Are you talking to anyone else about this, and when do you plan to decide?	
32	When would you like a proposal from me?	

The decision

#	Question	Notes
33	Who else will be part of this decision?	
34	Who would I work with day to day?	
35	How have you made decisions like this before?	
36	What would you need to see in a proposal to say yes?	
37	What concerns might someone on your team raise?	
38	Is there anything that could stop this from going ahead?	
39	What questions do you have for me?	
40	What would be a good next step for you?	

Swaps for your niche

Niche	Question	Notes
Coaches	What made now the right time to get support?	
Coaches	What have you tried on your own so far?	
Coaches	How much time can you give this each week between sessions?	
Virtual assistants	Which tasks take the hours you'd most like back?	
Virtual assistants	Which tools would I need access to?	
Virtual assistants	How do you like updates: a daily message, a weekly summary or only when something's done?	
Agencies	Who will give feedback, and who has the final say?	
Agencies	What do you already have: brand guidelines, copy, photos, logins?	
Agencies	Which past project, yours or someone else's, do you love, and why?	
Bookkeepers	Which software holds your books today, and how up to date are they?	
Bookkeepers	Who does your payroll and taxes today?	
Bookkeepers	How do you send receipts and bills now?	
Social media managers	Which platforms do your customers actually use?	
Social media managers	Who checks posts before they go live?	
Social media managers	Do you have photos, videos or brand guidelines I can use?	

Questions to skip

“Do you have a budget?” Ask for a rough range instead.

“Are you the decision-maker?” Ask who else will be part of the decision.

Leading questions such as “Wouldn't it be great if...?”

Several questions in one breath, and anything the form already answered.

Personal questions that have nothing to do with the work.

Close

“Thank you, this was really helpful. Here's what I heard: [the problem, the result, the date]. Did I miss anything? I'll send [a proposal / a few options] by [day]. If I have a question before then, is email the best way to reach you?”

After the call: your five answers

The problem, in their words

What success looks like and how they will measure it

Budget range and how they like to pay

Start date and the date that matters

Who decides and what they need to see

Next step and the date I promised

Any blank line above is your first follow-up email.